Defense Acquisition University

Aligning Your Organization

Achieving Tactical Wins and Strategic Success Organizationally and Personally

The Basic Process

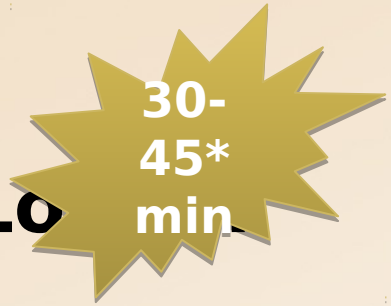
- **Focus Here Is On The Organization**
  - **Uses A 9 Step Process – Overview**
    - **Vision, Key Results Area, Current And Future States, Projects To Reach The Future, Project Champions, Milestones, Measures Of Goodness,**
    - **Disciplined Battle Rhythm Absolutely Essential!**
  - **Groups Of 12 To 30 With Teams Of 4 To 7 Ideal**
  - **Establish Team Meeting Approach And Basic Ground Rules**
    - **SPACER, Code Of Conduct, LCS, Thumbs Charts In Backup**
  - **Once Organization Aligned, Adapt Process For Personal Vision**
  - **Time required: 5 to 8 Hours Plus Breaks**

Step 1: Developing a vision statement

- **Don’t Get Bogged Down In This! Skip If Possible!**
  - **Probably Already Have One: Review And Go With It**
  - **Leverage Next Higher Organization Vision And Adapt**
  - **Last Resort: Start From Scratch – Details In Notes Concepts Here**
    - **Team Brainstorms Desired States 3 To 5 Years From Now (Typical)**
    - **Put On Large Post-it Pages On The Wall**
    - **Team Members Write Short Vision Statements On 3x5 Cards <= 40 Words**
    - **Pair Up And Refine Statements; Pair The Pairs And Refine Again**

Step 2: Identify Key Result Areas (KRA)

- **Preferred Approach: Develop With Team *Before* Session***
- **Prioritize The Top 5 KRA At The Meeting**
  - **Use Visual Technique: Colored Sticky Dots**
  - **Dots Per Person = 1/3 To 1/2 Number Of KRA**
  - **Example: 10 KRA = 3 To 5 Dots Per Person**
  - **Team Members Vote For Their Personal Top Choices**
  - **Allow Multi Voting**
- **Put Remaining KRA In Parking Lo Later**
- **Leader Has Final Say**
- **Each KRA On A Large Post-it On The**



Step 3: Current States and Year End States

- **Each KRA On A Wall Chart Looks This:**

Step 4

These two first

KRA TITLE HERE		
CURRENT STATES	**YEAR-END STATE**	**Milestones**
Current State 1	State 1	MS 1 … MS n
	State 2	MS 1 … MS n
Current State 2	State 1	MS 1 … MS n
Current State n	State 1	Ms 1 … MS n

Note:
1. There may be several "Current States" for each KRA. For example, Org Structure:
a. does not support effective horizontal integration
b. has clearly misaligned skill sets
c. is staffed to only 60% of authorization

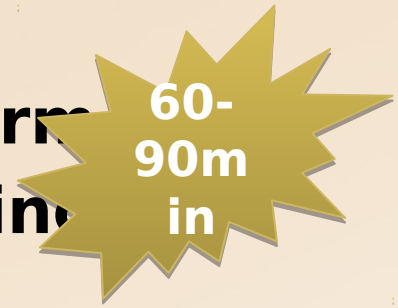
2. Where it says Year-End State, typically these align with individual Current States, but you could lay them out by Year 1, Year 2, etc. *Make the tool work for you by organizing things to fit your needs.*

- **Teams "Carousel Brainstorm" Each KRA**
  - **10 – 15 Minutes Per Current /Year End State Group**
  - **Current States First**
  - **Then Year End States**

60-90m in

Step 4: Refine and Develop Milestones

- Group Related Stickies For Each Current State (CS)
- Discuss And Refine Each CS
- Do The Same For Each Year End State (YeS)
- Carousel Brainstorm Prospective Milestones
  - "What By Whens" In Draft Form
  - Work Each CS and YeS Grouping



Step 5: Vote and Prioritize Year End States

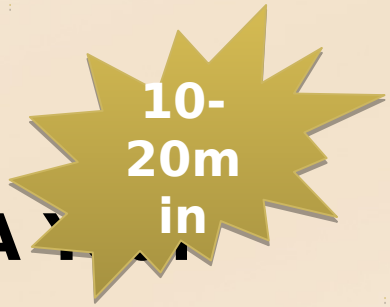
- **Similar to KRA Voting**
  - **Visual Technique: Colored Sticky Dots**
  - **Dots Per Person = 1/3 To 1/2 Number Of YeS**
  - **Example: 10 YeS = 3 To 5 Dots Per Person**
  - **Team Members Vote For Their Personal Top Choices**
  - **Allow Multi Voting**
- **Top Vote Getters Will Become Projects: Start Now**
- **Others Will Become Initiatives: Do As Resources Permit**

Step 6: Establish Projects

- Usually The Top 5 Vote Getters Or So
- Leader Ultimately Determines Criticality
- Usually Two Characteristics For Projects
  - High Payoff To KRA Achievement
  - Achievable In A Year Or Less
- Assign Champions To Each
  - Define Resources Required
  - Assess Achievability
- Group Discussion To Ensure Common Understanding

Step 7: Establish Initiatives

- Usually The Remaining Vote Getters
- Leader Ultimately Determines Criticality
- Usually Two Characteristics For Projects
  - Less KRA Payoff Than Projects
  - Often Longer Term (More Than A Year Out)
- Assign Monitors To Each
  - May Become Champions Later
  - Assess Relevancy As Part Of Progress Battle Rhythm
- Group Discussion Not Needed Now



Step 8: Milestone Refinement

- Champions Take Charge Of Their KRA(s)
- Ask For Team Volunteers Or Leader Assigns
- Clean Up Milestones For Each Project To Make
  - More Descriptive Of The “What”
  - Clear About The Benefit
  - Consensus On The “When”
  - Comfort Level With Resources
- Group Discussion For Understanding And Consensus

Step 9: Establish Project Battle Rhythm

- Perhaps The *Most Important Step*
- Validate Common Understanding Of Project Success
  - Aligned With KRA And Supports Vision?
- Identify And Engage Stakeholders And Process Owners
- Force Field Analysis: Factors Impeding Or Enhancing
  - Prioritize And Assign Actions To Mitig... Or Exploit
- Develop Plan Steps And Walk Through For Gap Analysis
- Closely Monitor "Scope Creep"

Summary

- Tailor The Process!
- Key Points
  - Have A Longer Term View
  - Identify Factors That Support That View
  - Understand The Current State And Define The Future State
  - Prioritize What To Work On Now And Later
  - Be Clear About What Describes “Success” For Each Project
  - Assign Ownership And Commit Resources To Each
  - Develop And Walk Through Each Action Plan: Fix Gaps
  - Disciplined Battle Rhythm: Review And

Organizing Your Meetings

S.P.A.C.E.R.

- **S**afety
  - Start with a safety tip. At an unfamiliar location, point out exits, restroom location, emergency signals, and any room hazards such as IT or power cables.
- **P**urpose
  - What are we here to accomplish? Why? What's in it for them?
- **A**genda/Objectives
  - **Identify the steps to achieve the purpose. End each meeting with action items and owners, next steps, and agenda items for the next meeting.**
- **C**ode of Conduct
  - **Assure the team treats everyone with respect, builds on ideas, and has a process for making decisions and resolving conflict.**
- **E**xpectations
  - **Ask: "Does the agenda meet everyone's expectations?" Modify the agenda if the answer is "no." At the end of the meeting ask: "Does the path forward meet expectations?"**
- **R**oles and Responsibilities
  - **What roles should be assigned to keep the meeting on track? (Facilitator, Leader, Process Checker, Recorder) Assign responsibility for action items before adjourning.**

Group Behavior Conserations

Code of Conduct Considerations (C3)

Generally Accepted Rules

- LCS (Likes-Concerns-Suggestions)
- Absolutely no personal attacks
- Demonstrate mutual respect
- One conversation at a time
- Don't talk over people
- Be on time
- Cell phones /pagers /Blackberries on stun or off
- No whining!
- Limit comments to 2 minutes or less so others can contribute
- Support your point with facts and data
- Active listening: hear and give feedback on what you heard
- 3-knock rule if individual/group starts down a rat hole
- Use the Parking Lot for unresolved issues
- You favorite here!!

Avoid The Unwanted Visitors

Have each individual identify their top two "visitors" and give a code word to the group to remind them to "stifle" when that visitor shows up! This approach gets the vulnerability our of the way early in the project effort and helps avoid conflict.

Storyteller: goes on and on with something not germane to the issue at hand

Wallflower: inherently shy and doesn't get engaged

Interrupter: doesn't let teammates finish their point

Repeater…Repeater: thinks saying it over and over again convinces you

Side Talker: decides that his side conversation is more important than group's

Rambler: just where is this person going and why would I want to follow them???

Cowardly Lion: participates but never offers anything that might be challenged

Generalissimo: tries to take charge of every situation

Withdrawer: group dynamics and activities make this person uncomfortable

Hurt Puppy: thin-skinned and will withdraw when feels personally attacked

Adopt The "I Can Live With It" Approach To Consensus

- Thumbs up = Agree; let's move on
- Thumbs sideways = I can live with it; let's move on
- Thumbs down = I cannot live with it; I'm concerned because…

Reaching Consensus

Likes - Concerns - Suggestions L-C-S

1. **LISTEN** to someone pitch a new idea
2. **LIKE**: Acknowledge what you like about the idea (try to come up with three things).
3. **CONCERN**: Express whatever concern you have about the idea.
4. **SUGGEST:** For each concern, make a suggestion to either deal with that concern or to make the idea better.

This approach avoids immediate conflict, forces YOU to think more thoroughly about the idea, and often helps generate new ideas from other stakeholders. It's a powerful tool (and often works with teenagers and spouses as well!). You'll see this approach listed as the first of the "Generally Accepted Rules" on the next chart, Code of Conduct Considerations (C3).

Sample Key Results Area

- People
- Organizational Battle Rhythm
- Budget Justification
- Morale or Trust Building
- Customer Satisfaction
- Employee Satisfaction
- Communication
- Building a Winning Team
- Growth
- Horizontal Integration
- Vertical Integration
- Technology Evolution
- Lean Six Sigma
- Value Steam Improvement
- Cycle Time Reduction (Schedule improvement)
- Technical Performance Achievement
- Cost Reduction
- Joint Program Management
- Foreign Military Sales
- Productivity
- Innovation
- Organizational Structure
- Add yours here!!

Force Field Analsys